

# AlarmBiller Support Training Agenda

08/06/2024 4:33 pm EDT

Duration: 1 Week Full AB Training

Day 1

Morning:

- Intro to Company and Each other / Review training schedule / Discuss EOS (book)
- AlarmBiller-Development Monday Meeting
- Review accrual accounting and purpose of AlarmBiller with relation to accounting and our customer's daily business
- App Training:
  - Home Screen Widgets, User Settings, Support
  - Tasks
  - Accounting Tab – Drop down, and permanent tabs
  - Queues in AB
  - Proposals – Customers – Invoices – Payments – RMR – Work Orders – Calendar – GL – Reports

Afternoon:

- Setup new laptop, basic logins, and HR basics
- Practice what was reviewed in App Training and Think of at least 3 questions for tomorrow

Day 2

Morning:

- Questions
- App Training:
  - Vendors – Bills – Payments – Print Checks – Purchase Orders
  - Inventory – Warehouses – Parts – Part Ledger
  - Setup

Afternoon:

- Practice what was reviewed in app training

Day 3

Morning:

- Questions
- SalesAutomation
- EForms
- Time and Attendance
- Review Ticket, Email, and Live Assist process
- Select tickets from the queue, research, and draft responses

Afternoon:

- Practice what was reviewed in app training

## Day 4

### Morning:

- Questions
- Review tickets and go over responses together
- Select handful of tickets for independent review this afternoon
- Select, Research, and Draft Responses for tickets

### Afternoon:

- Continue Research, plan responses, and schedule live assists
- Review Drafted Responses together and perform joint live assists

## Day 5

### Morning:

- Questions
- Role Reversal – explain to me (in general) what the different modules in AlarmBiller are for. This is not a detailed explanation of what buttons to press, but rather a general overview, i.e. why do users go to the work order module? What are the different things they can do there?
- Trouble Shooting Tips
- Select tickets and Schedule live assists for the afternoon

### Afternoon:

- Role Reversal – do live assists together but you lead
  - Select tickets from the queue, research, and draft responses
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